Self-evaluation on the relevance of the Forest Products Annual Market Review to the needs of member States and challenges in the forest sector implemented by the UNECE/FAO Forestry and Timber Section

Final Report
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This evaluation was commissioned by UNECE/FAO Forestry and Timber Section
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## Abbreviations

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<thead>
<tr>
<th>Abbreviation</th>
<th>Full Form</th>
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<tbody>
<tr>
<td>COFFI</td>
<td>UNECE Committee on Forests and the Forest Industry</td>
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<td>COVID-19</td>
<td>Coronavirus disease 2019</td>
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<td>EFC</td>
<td>FAO European Forestry Commission</td>
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<tr>
<td>EECCA</td>
<td>Eastern Europe, Caucasus and Central Asia</td>
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<td>FAO</td>
<td>Food and Agriculture Organization of the United Nations</td>
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<td>FPAMR</td>
<td>The Forest Products Annual Market Review (also used as <em>The Review</em>)</td>
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<td>FTS</td>
<td>UNECE/FAO Forestry and Timber Section</td>
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<td>JFSQ</td>
<td>Joint Forest Sector Questionnaire</td>
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<td>KI</td>
<td>Key Informant</td>
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<td>RB</td>
<td>Regular Budget (of UNECE Subprogramme 7)</td>
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<td>SDG</td>
<td>Sustainable Development Goals</td>
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<tr>
<td>ToR</td>
<td>Terms of Reference</td>
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<td>ToS</td>
<td>Team of Specialists</td>
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<tr>
<td>UNECE</td>
<td>United Nations Economic Commission for Europe</td>
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<tr>
<td>XB</td>
<td>Extrabudgetary resources and in-kind contributions (of UNECE Subprogramme 7)</td>
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<tr>
<td>WiPoW</td>
<td>Warsaw Integrated Programme of Work</td>
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Executive Summary

PURPOSE, SCOPE, AND THE EVALUATION METHODOLOGY

The Forest Products Annual Market Review (referred to as the Review) is jointly conducted by the United Nations Economic Commission for Europe (UNECE) and the Food and Agriculture Organization of the United Nations (FAO); it provides a comprehensive analysis of forest products markets and reports on the main forest products market influences and developments in the UNECE region. The evaluation covers coordination of the research work, implementation by the UNECE secretariat, liaison and collaboration with partner organizations, reporting to the UNECE Committee on Forests and the Forest Industry (COFFI) and the FAO European Forestry Commission (EFC) and internal reporting from 2018 until 2021. The evaluation answers questions on relevance, coherence, efficiency and sustainability of the Review. The evaluation uses a mixed methodology, incorporating the desk study of all relevant documents, independent research, Key Informant interviews with seven respondents and the online survey producing 64 responses. The results and responses were triangulated to produce the findings, conclusions, lessons learned and recommendations. The evaluation took place from July to November of 2022.

MAIN EVALUATION FINDINGS AND CONCLUSIONS

Relevance. The evaluation found that the work conducted in the framework of the Review was relevant to member States needs and priorities in the forestry sector. The Review, together with statistical annexes, provided up to date information allowing decision and policymakers to execute evidence-based policies for sustainable production and consumption of sustainable forest products. It is also a valuable resource for small businesses and academia. The majority of online survey participants thought that the Review was relevant to the needs of their countries, the majority was also very satisfied with the relevant regional information. The sustainable management of forests and forest resources is linked to SDG 15; it is also indirectly linked to SDGs 13, 12, 11, 9, 8, 7 and 6. However, as some Key Informants explained, the Review is not presently used for the government reporting or measuring of national SDGs. The Review captures emerging trends and challenges in the forest markets area and publicizes it on time. It also captures challenges in the forest products market sector; for example, the latest issues offered a comprehensive analysis of challenges caused by the COVID-19 pandemic on the forest products market in the UNECE region. While gender, human rights and disability perspectives have not been integrated in chapters of the Review, the evaluation acknowledged a sizable representation of female authors and contributors. Some Key Informants suggested that gender, human rights or disability had little relevance to the forest products market publication.

Coherence. One of the greatest features of the Review is consistency for analyzing specific commodities surrounding forest products markets in the UNECE region, its readers are regularly informed on major developments, shifts and trends on forest-based commodities. The Review was optimized in response to COVID-19 related challenges and, while offering less content, it still delivered comprehensive information in printed and different digital formats. Interviewed Key Informants agreed that the cooperation developed within the context of market discussions, as well as collaboration for the Review produced benefits for member State representatives. Forging professional relationships within the context of the Review helped experts better understand the data from other countries. Developing and compiling the information of the Review is important for creating partnerships that contribute to ensuring policy coherence. Having a common understanding increases UNECEs communication with member States and helps them to be aware of current trends and developments in the sustainable forest products market sector.
Efficiency. The evaluation found that UNECE regular budget provided the framework for the publication, while only a fraction of funding from member States helped to contract experts outside the UNECE in order to obtain expert market intelligence. There were sufficient resources available to publish the Review due to member States financial and in-kind contributions. The funding became a big problem during the COVID-19 pandemic, the UNECE/FAO FTS optimized the process and used in-kind expert help. The lack of resources also affected the translation of the Review. The production of the Review requires substantial human resources at UNECE/FAO FTS; as one member of the staff retired, the expertise was lost and could not be replaced with the newly hired staff member, hence it becomes even harder to continue the publication to the full extent as in the past. The regular budget for the Review covers the cost for data collection, statistical analysis, layout, printing and translation of the publication. It also covers UNECE/FAO FTS staff directly working on the production of the Review. The available resources, both financial as well as in-kind were spent efficiently to produce the Review.

Sustainability. The evaluation found that the Review is extremely valuable for research and analysis and as a reference document. Public servants utilize it to highlight the importance and relevance of the forest sector for the national economy, while forestry experts depend on the Review to showcase the value of the industry. According to the online survey results, the Review is primarily used for background information, referencing, data, graphics and visualization, and it is stimulating an interest of stakeholders beyond the publication date. As a UN publication, it offers a safe and attentive environment for governments, industry, international organizations and academia to share their views and exchange ideas. Key Informants and the results of the online survey suggest that the Review would benefit from turning into a digital publication.

Recommendations

1. The evaluation recommends the Forest Products Annual Market Review to include information, data and statistics on Sustainable Development Goals relevant to the various forest products market sectors.
2. The evaluation recommends the subprogramme to consider – to the extent possible and without creating additional workload – redirecting existing regular budget resources for layout and printing to be primarily used to produce an electronic publication. A machine-readable electronic publication makes the content accessible to visually impaired users and users not able to read one of the three official languages of the UNECE via machine translation.
3. The evaluation recommends the subprogramme to investigate how – within the resources available – technological solutions could help further streamline the workflow to adjust to the human resources available in the subprogramme. These solutions could include – but may not be limited to – (partially) automated text generation automated interactive graphics based on information from the database, and shorter expert assessments by each market segment.
4. The evaluation recommends the subprogramme to urge member States to consider a long-term planning for sustainable funding of the independent market expert input to the Review through a multi-donor, multi-year project.
5. The evaluation recommends the subprogramme to raise to the extent possible, awareness among member State representatives and readers of the Review on gender and human rights issues related to the forest market sector. This could be done by including a relevant question on gender and human rights in the Country Market Statements, the results could be summarized in the economic overview and policies chapter of the Review.
Introduction

The Forest Products Annual Market Review – referred to in this evaluation as “the Review” - is a flagship publication of UNECE subprogramme 7 “Forests and the Forest Industry”. It provides a comprehensive analysis of forest markets and reports on the main forest market influences and developments in the UNECE region covering Europe, North America, Eastern Europe, Caucasus and Central Asia (EECCA). The Review is jointly implemented by the United Nations Economic Commission for Europe (UNECE) and the Food and Agriculture Organization of the United Nations (FAO). The independent evaluation was commissioned to assess the way the Review captures and conceptualizes shifting trends in sustainable forest management and forest products markets over the period from 2018 to 2021. The evaluation took place from July to November 2022.

Context of the evaluation

Sustainably produced wood is an important global commodity and UNECE member States account for some 40% of global forest resources and more than 60% of wood harvested globally for the manufacturing of wood products. UNECE, according to its mandate, aims to facilitate economic integration and promotion of sustainable forestry development through policy dialogue, negotiation of international legal instruments, development of regulations and norms, exchange of best practices and technical expertise. The Reviews are produced by UNECE subprogramme 7, Forests and the Forest Industry, Joint UNECE/FAO Forestry and Timber Section. The Reviews are the main background documents for the annual Market Discussion of the UNECE Committee on Forests and the Forest Industry (COFFI), a principal subsidiary body of the UNECE. Among the objectives of the subprogramme are strengthening of sustainable management of forests and contribution of forests and forest products to sustainable development in the UNECE region. To achieve these objectives, the subprogramme annually collects data from member States on production, trade and consumption of wood and wood-based products. It further validates and assesses the main drivers behind the market trends and discusses subsequent developments by consulting with policy, trade and industry experts and government representatives among its member States. It is expected that such actions support evidence-led policymaking for the sustainable production and consumption of forest products, resulting in increased and more efficient use of sustainable forest products and the sustainable use of natural resources among UNECE member States.

The COFFI constitutes a forum for cooperation and consultation among member States on forestry, the forest industry and forest products matters. The joint session of the UNECE COFFI and the FAO European Forestry Commission (EFC) adopted the Warsaw Integrated Programme of Work (WIPoW) for the period of 2018-2021. It was structured around four Work Areas. The Review is in line with Work Area 1 on “Data, monitoring, reporting and assessment”. The work includes analysis and assessment of forest products markets (29b) and gathering of comprehensive statistics and data, developing methodologies for data collection, analysis and assessments of forest product markets and services.

1 UNECE Objectives and Mandate https://unece.org/objectives-and-mandate
The Review is one of the outputs of this Work Area. According to the WIPO, the Team of Specialists (ToS) on Sustainable Products was tasked with the provision of expertise for drafting market-related publications and products, including the technical reviews, and the production of the Review. The ToS was also tasked with advising the secretariat on strategies in the forest products sector. The ToS on Wood Energy was also tasked with providing the input to the relevant chapter of the Review.

Subject of the evaluation

While the primary purpose of the Forest Products Annual Market Review is to be used as a main background document for the annual Market Discussions of COFFI, it has also served academia, industry and governments on the forest markets sector for decades. The Review contains general overviews of the forest products markets in the UNECE region and beyond since UNECE member States are the key producer and exporter of wood products globally. The opening chapter highlights key issues and policies and provides an up-to-date description of the economic situation in the UNECE region, that is followed by standard market chapters examining the market development and their drivers for roundwood, sawn softwood, sawn hardwood, wood-based panels, paper and pulp, certified forest products, forest sector carbon markets and value-added forest products. The editions of 2020 and 2021 were downsized from ten to seven chapters. Each chapter offers analyses on production, consumption, trade and other important developments in the forest products markets among member States.

The UNECE website holds 24 digital issues of the Review, covering the period from 1997 until 2021, available for free download. 600 copies of the Review were printed annually in English; the review is also translated and printed in French (50 copies printed) and in Russian (50 to 150 copies printed); paper copies are distributed by the subprogramme for free. The Review can also be found for sale on different websites. Being an official publication by the United Nations, the Review has a sales number, unique book, e-book and serial publication identifiers like ISBN, eISBN, ISSN and eISSN.

The Review is the product of collaboration between official country correspondents, international pool of authors, reviewers and editors, members of the UNECE/FAO ToS and experts working at the UNECE and FAO headquarters. Those involved in producing the Review volunteer their time and knowledge, and some are also supported by the private sector, academia, forestry associations or other organizations. The production of the Review consists of multiple steps and actions. The Review is built on the statistical work conducted by the subprogramme and provides instant analytics on the data collected via the Joint Forest Sector Questionnaire (JFSQ). The project documentation offers a detailed description of steps for preparation and input of data, creation of content and its review for technical aspects and consistency of its content at the FAO and UNECE. At the final stage, the Review is professionally edited and printed for discussions during the annual COFFI or joint COFFI/EFC meetings and is further distributed among stakeholders.

3 https://unece.org/forests/annual-market-reviews
4 Some paperback issues are found on amazon.com website for sale.
Evaluation scope, objectives and questions

As stipulated in the Terms of Reference (ToR) (see Annex 1), this evaluation looks into the activities associated with the Review over the period from 2018 to 2021. The evaluation covers coordination of the research work; implementation by the UNECE secretariat, liaison and collaboration with partner organizations at national and international levels; reporting to the UNECE COFFI and the FAO EFC; and internal reporting.

The objective of the evaluation is to answer questions on relevance of the Review for advancing intergovernmental efforts towards evidence-based policies, contribution to the achievements of the SDGs, its adaptability to capture emerging trends and challenges and whether it integrates gender, human rights and disability perspectives. The evaluation examined the extent to which the Review treats the issues in a coherent manner, creates synergies and contributes to policy coherence in achieving the SDGs. It also looks into the resources that were spent on the Review, the balance between different types of budgets and if the available resources were used efficiently. The objective of the evaluation is also to examine the sustainability of the Review, if the Review is referenced by its users and if it is soliciting broad engagement beyond the publication date.

In compliance with the United Nations Evaluation Group’s revised gender-related norms and standards the evaluation integrates universally recognized values and principles of human rights and gender equality into all stages of the evaluation. It assesses how gender considerations and the perspectives of human rights and groups with disabilities were included in the Review. The evaluation incorporates recommendations on how gender and human rights considerations can be better reflected in the future publications.

Evaluation methodology

This evaluation was conducted in line with the specific purpose, scope and questions contained in the ToR (Annex 1), using mixed evaluation methodology, focusing on the outcomes and accomplishments of the work undertaken during 2018-2021. The evaluation assessed the extent to which the Review was relevant, coherent, efficient and sustainable. It was conducted in alignment with the United Nations Evaluation Group Norms and Standards for Evaluation and in accordance with the ECE Evaluation Policy as of December 2021. The results from the document review, independent literature research, Key Informant (KI) interviews and online survey results were triangulated to produce findings, conclusions, lessons learned and recommendations. The evaluation used gender-responsive methodology and sought evidence on the extent to which gender as well as human rights issues were integrated in the Review process. The methodology included following tools:

1. Desk study of all relevant documents including materials developed in support of the Review. These include the Review report for the relevant years (2018/19, 2019/20, 2020/21), reports on annual work programme implementation, proposed programme budgets, relevant UN and UNECE resolutions concerning the Review and related activities. The evaluation also examined meeting agendas,

participant lists, background documents, lists of Teams of Specialists (ToS) working on the Review, different reports and publications through independent research. Reviewed documentation is listed in Annex 2.

2. Key informant (KI) interviews with the selected stakeholders through online communication. Interviews with the selected KIs were conducted over the phone and online, it focused on in-depth qualitative information on what was helpful and what can be improved. Seven Informants were selected in consultation with the UNECE. There were separate set of questions designed for the UNECE and FAO representatives. KIs included relevant project staff at UNECE and FAO and stakeholders of Review that had thorough knowledge of this publication and the process behind its production. The evaluation KI interviews were conducted in English. A list of KIs with corresponding dates of interviews is enclosed in the Annex 3, questions for KI interviews are listed in the Annex 4.

3. An Online survey was administered among the wide pool of members of the UNECE/FAO Teams of Specialists and other stakeholders. The survey included 18 multiples-choice quantitative and 10 open-ended questions for qualitative analysis. The online survey was administered using Google Forms, questions were available in English and Russian. Survey questions are listed in Annex 4 of this report. It was administered to about 350 members of the ToS and other relevant stakeholders from September 7 to October 5, 2022, with a single reminder on September 23, 2022. The online survey recorded total of 64 individual responses which corresponds to a response rate of 18%. Among the respondents 49 were male and 15 female; the majority (59%) represented European countries, while others came from the EECCA (19%) and the North American regions (13%). The majority of survey participants, as shown in figure 1 below, are members of ToS (62%), followed by National Correspondents (20%), Official Delegates (10%) and other stakeholders.

In what function are you linked to the section? /

60 responses

- 61.7% Official delegate / Официальный делегат
- 10% National correspondent / Национальный корреспондент
- 20% Team of specialist member / Член ко...
- Former chief
- Former staff
- Intern from 2021
- Representative of NSI Bulgaria in the f...

Figure 1 Online survey - In what function are you linked to the section

Limitations

Low response rate was expected for both key informant interviews and online survey. In order to mitigate the potential negative effect of low responses, UNECE directly arranged contacts with informants and circulated the online survey among the Review stakeholders. Reminder emails were sent to the survey participants and the deadline for online survey was extended.

Recall bias, as number of questions raised during the interviews and online survey dealt with events that took place in the past. Some interviewers were either unaware or uninformed on past issues, these events were recreated through documentation and independent research.
Findings

In order to answer the evaluation questions, it is important to consider who the readers and users of the Review are and how and for what purposes they use the Review. Below are the quantitative results from the online survey where relevant stakeholders had a chance to mark their preferences.

The majority of online survey participants work for national governments (32%), followed by international organizations (24%), academia (19%) and forest products manufacturing industry (8%). Out of 64 respondents, 17 have read the entire Review during the past three years, the majority, 45, read it partially and 2 have not read it at all. Almost two thirds of the survey participants (63%) thought that the Review was very useful, while the rest (37%) marked it as somewhat useful. Figure 2 below shows that most survey respondents read the Review over the desktop, some also used paper edition, while only three individuals used mobile devices or tablet for reading.

Surveyed respondents also indicated how useful they found each section published in 2020 and 2021 Review editions. As demonstrated in figure 3 below, the most useful section was that on wood raw materials (37) followed by sawnwood (31), wood energy (31) and value-added wood products (31). A section for pulp and paper products was marked as somewhat useful by a significant number of users (25). Among the sections the economic overview and policies section was skipped the most (9).
Findings discussed below are based on questions that follow the evaluation criteria of relevance, coherence, efficiency and sustainability.

Relevance

1. **Is the work conducted in the framework of the Forest Products Annual Market Reviews relevant for advancing intergovernmental efforts towards evidence-based policies for sustainable production and consumption of forest products and sustainable forest management?**

2. **To what extent does the FPAMR contribute to the achievements of the SDGs?**

3. **To what extent is the FPAMR adapted to capture emerging trends and challenges in the area of sustainable production and consumption of forests products and sustainable forest management?**

4. **To what extent does the analysis conducted in the framework of the Forest Products Annual Market Reviews integrate gender, human rights and disability perspectives?**

The work of the Review consists of multiple steps and actions that involve the UNECE/FAO FTS and members of the ToS. The Review is a product of expert collaboration that provides valuable information to member States on forest products markets in the UNECE region. The ToS are tasked with the provision of expertise and advice in the process of the Review. The UNECE/FAO ToS on Sustainable Forest Products had 89 members (19 females) from more than 30 countries, the ToS on Forest Products Statistics had 41 members (16 females) from more than 25 countries and the ToS on Wood Energy had 29 members (5 females) from 11 countries. These experts are seconded from ministries, national forest agencies, international organizations, the forest industry and academia. It is evident from the examined documentation, that members of the ToS, aside from writing actual chapters of the annual Review, regularly discuss the forest market matters, make suggestions on customization and improvement of the Review, reflecting needs, interests and priorities of member States in this process. According to evaluation documentation, member State representatives voiced their satisfaction with specific information provided in the chapters of the Review and the changes of the format; they also asked more information on future and trending commodities. KIs from EECCA

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7. [https://unece.org/sites/default/files/2022-02/List%20of%20Members-%20ToS%20on%20Sustainable%20Forest%20Products%202022-2023%29.pdf](https://unece.org/sites/default/files/2022-02/List%20of%20Members-%20ToS%20on%20Sustainable%20Forest%20Products%202022-2023%29.pdf)
8. [https://unece.org/sites/default/files/2021-04/tos-fps-members-2021-03.pdf](https://unece.org/sites/default/files/2021-04/tos-fps-members-2021-03.pdf)
and EU countries thought that the Review was relevant for their country and region; as one expert explained, the data on forest markets is difficult to find and at times this publication is the only relevant freely available source of information on forest product markets: “the FPAMR gives an excellent overview on what is happening in the neighbouring Balkan countries, we don’t have any other resource that brings all the data, statistics and analysis into one place”. Another government representative from the EECCA region also agreed that they use the Review “to see and compare developments in neighbouring countries and regions that affect our national policy on forests”. Others thought that the Review together with its statistical annexes, provided up to date information allowing decision and policymakers to execute evidence-based policies for sustainable production and consumption of sustainable forest products.

While having a qualified and reliable source of information is important for the national governments, it is also relevant for the representatives of forest industry and academia. All KIs highlighted that most importantly, it is a free source that is equally appreciated by representatives of academia and small businesses who can’t afford to purchase commercially available information and data on forest products markets as they “rely on the FPAMR for guidance”.

Participants of the online survey expressed their opinion regarding the relevance of the Review to the needs of their county, region or sector. As demonstrated in figure 4 below, the majority (55%) of surveyed experts thought that the Review was very relevant, while others (37%) thought it to be somewhat relevant to the needs of their countries.

As figure 5 below demonstrates, the evaluation online survey participants also expressed their opinion regarding the satisfaction with information provided in the Review. As online survey results show the majority, 41 among 61 individuals were very satisfied with the information on their region, while 20 were somewhat satisfied. 37 surveyors among 56 were also very satisfied with the information on other regions and 19 were somewhat satisfied.

Figure 4 Online survey results - how would you rate the relevancy of FPAMR to the needs of your country, region or sector?
/ Как бы Вы оценили актуальность FPAMR для нужд вашей страны, региона или сектора?
62 responses

<table>
<thead>
<tr>
<th>Rating</th>
<th>Percentage</th>
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<tr>
<td>Not relevant/ Не имеет значения</td>
<td>54.8%</td>
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<tr>
<td>Slightly relevant/ Малоактуально</td>
<td>37.1%</td>
</tr>
<tr>
<td>Somewhat relevant/ Несколько актуально</td>
<td>8.1%</td>
</tr>
<tr>
<td>Very relevant/ Очень актуально</td>
<td>55.0%</td>
</tr>
<tr>
<td>Don't know/ Не знаю</td>
<td>8.1%</td>
</tr>
</tbody>
</table>
Achievement of the UN Sustainable Development Goals by 2030 depends on proper implementation of a circular economy. For the forest sector context this is related to sustainable management and use of forests and forest products. The Review covers policies, trends, sustainable production and consumption of forest products, trade statistics and market intelligence in the UNECE region. The sustainable management of forests and their resources is directly linked to SDG 15 on life on land, namely to SDG target 15.1 that aims to ensure the conservation, restoration and sustainable use of forests and target 15.2 that promotes the implementation of sustainable management of all types of forests. The Review is also indirectly linked with several other SDGs. Among them are SDG 13 on climate, SDG 12 on responsible consumption and production, including recyclable commodities, SDG 11 on sustainable cities and communities, where wood products play an important role for construction, renovation and furniture, SDG 9 on industry, innovation and infrastructure, as forest market is constantly developing innovating methodologies and knowledge on sustainable use of forest products, SDG 8 on decent work and economic growth as forests are providing important employment and livelihoods opportunities, SDG 7 on clean energy, as wood is considered a critical source of energy, especially among the rural communities in the developing countries, and SDG 6 on clean water and sanitation.

Interviews with the KIs showed that annual reports of the Review are not used by the governments for reporting on SDGs, since this information is collected and reported in different, specialized publications. As one government affiliated KI explained, “FPAMR in theory is relevant for reporting progress on SDG 15, but for the reporting you need raw data which are provided in the national reports, therefore the governments have no need to consult this publication for reporting purposes”. As another government representative KI from EECCA explained it was not just the publication but “the process involving experts and members of ToS that work towards achievement of SDGs, especially SDG 15, SDG 13, SDG 12 and SDG 11, they are very relevant for my government”. Different KI also remarked that the authors of the Review “work against the clock, that doesn’t leave enough time to discuss or analyze SDGs”.

Figure 5 - Online survey results, how satisfied were you with the information for your region/ other regions
As shown in figure 6 below, almost 50% of the online survey participants thought that the Review contributes in part to the achievement of the SDGs in their countries, 25% didn’t know if it contributed and 22% agreed that the Review contributed entirely to the achievement of SDGs.

In your opinion does the FPAMR contribute to the achievements of the Sustainable Development Goals (SDGs) in your country, region or sector? …вашему мнению, вносят ли РДФП вклад в достижение целей устойчивого развития (ЦУР) в Вашей стране, регионе или секторе?

63 responses

- 22.2% Does not contribute / Не способствует
- 25.4% Contributes in part / Частично способствует
- 49.2% Contributes entirely / Полностью способствует
- 2.2% Don’t know/ Не знаю

Figure 6 Online survey results- does the FPAMR contribute to the achievement of SDGs in your country, region or sector?

The Review brings together specialists from at least 30 UNECE member States, these experts of forest market products are on the forefront of national and regional forest market sector, representing the governments, international organizations, academia and industry. The Review reflects views and ideas of its contributors and authors who are well informed on the emerging trends, innovations as well as challenges in their fields of expertise. As one of the authors explained during the KI interview, experts analyze data, make interpretation and add “anecdotal information that helps to explain trends in the industry”. Another KI also agreed and added that the information is clear and consistent, it effectively tracks trends from year to year. As forest markets production industry is becoming increasingly concentrated, it becomes important to measure and report the trends. It is also important to publicize emerging trends on time, as one KI explained “I’m from academia and it takes too long to get anything published, the nice thing about FPAMR is that we can publish it fairly quickly so that information, including on emerging trends, remains relevant for the sector.” One distinctive feature of the Review was a special chapter on highlights in the forestry products sector introducing market trends, innovations and the forest industry outside of ECE region. The special section was discontinued due to the lack of resources, although it was praised by KIs as very useful, and some expressed their disappointment for its discontinuation. While discussing the special section and emerging trends, one KI remarked that presently, the Review “tends to be insular to ECE countries, it doesn’t pay much attention beyond the region and that is a missed opportunity.”

The Review process also proved to be adopted to capturing challenges in the forest products market sector. According to the evaluation documentation, market discussions at the 2020 COFFI meeting included a topic on the effects of disturbances (bark beetles and fires) on forest products markets. Editions of 2019-2020 and 2020-2021 offered analysis of challenges caused by the COVID-19 pandemic.
on the forest products market in the UNECE region. The latest edition dedicated a special subchapter on economic developments and the pandemic response in the UNECE region.

UNECE/FAO joint program document WiPoW gives due consideration to “making the concerns and experiences of women and men an integral part of the design, implementation, monitoring and evaluation of its activities, so that women and men benefit equally, and inequality is not perpetuated”\footnote{The Warsaw Integrated Programme of Work 2018-2021, p. 26}. According to the same document, gender mainstreaming is a central part of UNECE and FAO’s strategic frameworks and their policies and programs. The evaluation documentation shows that the Review is open to the contributions from women in its activities and strives for balanced participation of women authors in the Review. There were a number of female authors involved in the creation of the content of the Review. In the 2018/19 edition there were three females among 22 authors, in 2019/20 there were two females among 20 and 2020/21 edition also had two female authors among 22. There was a sizable number of female contributors and national statistical correspondents who were acknowledged in the Review publications. As already mentioned previously, there were female members of ToS that collaborated with the Review process. The team of forest products included 19 females among 89 members, the team on forest products statistics had 16 females among 41 members and the team on wood energy included 5 females among 29 members. It should also be noted that at least half of the UNECE and FAO staff members who participated in the creation of the Review were females.

Examining the contents of the Review for the past three years shows that gender, human rights and disability perspectives have not been integrated in chapters. Some KIs suggested that these topics have little relevance to the forest products market, and they are covered in other, more specialized publications within and outside of the UN system. As one KI recalled, the UNECE conducted a study on gender and forest sector in the past, the publication was well received and appreciated by the forest sector experts. Another KI noted that it was “difficult to find female experts in the forestry sector at the national and field level, especially in countries of EECCA region”. There were several KIs who strongly felt that the Review was not the relevant or appropriate means to streamline gender, human rights or disability perspectives.

The evaluation inquired with the online survey participants on how gender, human rights and disability perspectives are incorporated in the forest sector in general. As demonstrated in figure 7 below, 39% of surveyed experts thought that gender, human rights and disability were partially incorporated in the forestry sector, 8% thought that they were completely integrated, 14.5% stated that they were not integrated at all and 37% were not familiar with the information.

\begin{figure}
\centering
\includegraphics[width=\textwidth]{figure7}
\caption{Percentage of surveyed experts who thought that gender, human rights and disability were incorporated in the forestry sector.}
\end{figure}

FPAMR is a gender-neutral publication, although, the voices of female forest market experts are well represented by female authors and contributors.

KI interview
Coherence

1. To what extent is the publication ensuring coherent treatment of the issues surrounding sustainable forest management and forest products and their trade?
2. To what extent does the work conducted contribute to creating synergies between national, regional and global levels?
3. To what extent do the partnerships created within the FPAMR contribute to ensuring policy coherence and the achievement of the SDGs?

One of the greatest features of the Review is consistency for analyzing specific commodities surrounding forest products markets in the UNECE region. From year to year, users have an opportunity to be informed on major developments, shifts and trends on forest-based commodities. Traditionally, the Review had ten chapters written on about 150 pages. According to the evaluation documentation, the Review was affected by COVID-19 pandemic related challenges. With insufficient XB resources and pandemic-related work restrictions, the UNECE/FAO was forced to optimize the Review. In response to the global pandemic, the activities of the Review were readjusted and the budget was reorganized to meet the global challenges. UNECE/FAO FTS optimized the publication by changing its style and length. The Review was launched owing to an in-kind contribution from authors and member States and the automation and standardization of tables and graphs. While the Review had fewer pages, 100 from usual 150, and only seven instead of traditional ten chapters, it still provided comprehensive information and was made available in various digital formats.

The evaluation online survey inquired if changes in content, style and length affected the quality of the Review. As shown in figure 8 below, more than half of online survey respondents thought that these changes were somewhat useful and almost a quarter of them thought the changes were very useful.
In 2020 the style, content, approach and length of the publication was significantly changed, did you find these changes useful? / В 2020 году с...емы. Считаете ли Вы эти изменения полезными?

63 responses

Figure 8 - Online survey results, in 2020 the style, content, approach and length of the publication was changed, did you find these changes useful

As UNECE/FAO project staff member observed, the coherent collaboration with the ToS provided representatives of member States an opportunity to discuss, learn and network with colleagues. Individual country representatives also highlighted the importance of coherent collaboration among government representatives, industry, international and local NGOs, academia and experts that the Review has brought together.

The evaluation inquired with the KIs regarding the Review process and its contribution to creating synergies among national, regional and global levels. Most KIs agreed that the cooperation developed within the context of market discussions, as well as the collaboration for the Review produces benefits for member State representatives.

The majority of interviewed KIs confirmed that the Review was more than a publication for them, “it is the opportunity to network and collaborate on a regular basis on different topics that affects the forest market”. Forging professional relationships helps experts better understand the data from other countries. According to one comment on the online survey, the Review is mostly focused on the UNECE region, although there is information on large suppliers and consumers of forest products, like China, and that also affects the global picture. Survey participant also noted that it was good that the Review was focused on the region. A FAO staff member recalled during the KI interview that the organization used to publish a similar review with global perspective “it was too vague, it’s difficult to do global analysis, it has to be more focused”.

The online survey inquired if the Review contributed to creating synergies among national, regional and global levels. As demonstrated in figure 9 below, 41% believed that it contributed in part, 35% that it contributed entirely, while 22% didn’t know the answer to this question.
Developing and compiling information for the Review is important for creating partnerships that contribute to ensuring policy coherence. As one KI remarked, measuring and reporting the information on forest products markets to various levels of government and other stakeholders, including NGOs and trade associations through the Review “allows everyone to get the same picture through the eyes of experts that have years of knowledge that otherwise would sometimes be missed”. According to the UNECE/FAO staff member KI, the Review creates partnerships with countries represented by ToS, countries that report on annual JFSQ and countries that discuss market development during the COFFI forest products market discussions. The Review stimulates a dynamic group of forest products market experts and their statements feed into the committee market statement “bearing their signature”. Having a common understanding increases UNECE communication with member States and helps them to be aware of current trends and developments in the sustainable forest products market sector.

**Efficiency**

1. *Were there sufficient resources available to achieve the intended outcomes, including in a timely manner?*
2. *Does the work strike a good balance between the use of RB and XB?*
3. *Have the available resources been used efficiently to deliver expected outputs?*

To answer the question on whether there were sufficient resources to achieve the intended outcomes in a timely manner, the evaluation examined available documentation and interviewed relevant KIs. The regular budget for the Review covers the major part of the production process costs, such as data collection, the statistical analysis, the layout and printing as well as the translation of the document. The UNECE/FAO FTS allocated 3 months of P3 and G7 staff for the coordination and production of the Review and half month of G5 staff for language editing, one week of G4 staff for preparing contracts, one week of P5 staff time and one week of D1 staff for checking and approving the content. The UNECE RB covered for costs for layout and printing which comprises about 2 months for layout by a G5
The UNECE further used RB to cover for costs for translation of the publication by UNOG translators (T3) into English and Russian. Only a small fraction of the publication budget – about USD 50,000 - was historically used to contract market experts who i) provided feedback on the data prepared by the UNECE, ii) used their market intelligence and knowledge to describe the drivers behind market trends and often iii) prepared a presentation on various markets during the Committee on Forest and the Forest Industry’s Market Discussion. Up until 2015, the Review was entirely funded by regular budget from UNECE and FAO. Since then, the regular budget for consultancies decreased significantly which led the programme to successfully attract financial contributions from member States. The reduced funding available led the subprogramme to reduce the number of contracts and chapters and to only focus on the essential chapters. In-kind contributions by experts from member States helped to further reduce the need for XB funding. All issues of the Review were printed on time and made available to delegates of the COFFI session.

Table 1 below outlines the required XB in addition to the RB resources by budget year with commitments and available funds for the contracts as extracted from the Review Planning Sheets. Only during the peak of the COVID-19 period, the available funds did not cover the budget required.

<table>
<thead>
<tr>
<th>Budget year</th>
<th>Budget committed</th>
<th>Available funds</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017-2018</td>
<td>USD29,500</td>
<td>USD29,520</td>
</tr>
<tr>
<td>2018-2019</td>
<td>USD31,600</td>
<td>USD39,281</td>
</tr>
<tr>
<td>2019-2020</td>
<td>USD34,600</td>
<td>USD16,000</td>
</tr>
<tr>
<td>2020-2021</td>
<td>USD30,300</td>
<td>USD30,630</td>
</tr>
</tbody>
</table>

The UNECE/FAO Working Party documents highlight the financial and in-kind contributions of member States, as well as individual experts and scholarships for junior publication assistants for the production of the Review. To illustrate, in 2018 the Review was made possible through funding from Finland, with significant in-kind contributions from many authors and a scholarship by the University of Helsinki. In 2019 Finland again funded the Review with significant financial and technical assistance from FAO Rome. However, due to the global COVID-19 emergency, as shown in table 1 above, funds were insufficient for the production of the 2020 Review edition. In the time of crisis, experts from University of Helsinki, University of Missouri and University of British Columbia made in-kind contributions, helping with research, data and graphics. As a result, UNECE/FAO FTS optimized the production of the Review as already described earlier. In 2021 Sweden made a financial contribution while the United States Forest Service allowed four of its staff members to dedicate time and expertise to several chapters, and the Bern University of Applied Sciences, the Swedish University of Agricultural Science, and the University of British Columbia provided scholarships for junior publication assistants. Funding was also made available from the Russian Federation in the past.

The lack of resources has also affected the translation of the Review; according to the documentation, edition of 2020-2021 was only produced in English language for this reason. The French and Russian versions of the Review also experienced significant delays for the past three years.

11 This is estimated to amount to approximately USD 135,000.
The production of the Review requires substantial human resources at UNECE/FAO. As one member of staff recently retired, whose expertise on forest industries in North America was not replaced, it became even harder to organize the entire publication. Members of UNECE secretariat had to perform on top of their other important duties to help out with the Review. As UNECE/FAO staff member KI remarked it was “a struggle to secure experts without regular budget funding.” Other KIs also pointed out the limited available personnel, that left less time and resources to work on the production of the Review. However, as one KI noted during the interview, forestry experts are ready to volunteer their time “I’m sure many of us will support it strongly with our expertise free of charge, it’s important for industry and businesses to have annual FPAMR.”

The evaluation question on balance between the use of RB and XB cannot be answered with certainty. According to the evaluation documentation and attested by UNECE/FAO staff, expenses related to the contracted authors of the Review are paid out from XB sources, while several authors provided their content as in-kind contribution, or some parts of the text were prepared by the staff of the subprogramme.

The available resources, both financial as well as in-kind were spent efficiently to produce the Review. When no resources were available during the COVID-19 pandemic, UNECE/FAO optimized the Review in a way that still enabled the delivery of information to member States.

**Sustainability**

1. To what extent are the outputs delivered within the context of FPAMR sustainable?
2. To what extent is the FPAMR considered as a reference source by stakeholders?
3. To what extent does the FPAMR and the discussion around it contribute to soliciting broad engagement from different stakeholders from governments, private sector and academia beyond the publication date?

The Review publication and process surrounding it is generated through the collaboration of UNECE/FAO FTS and member States and is dependent on available funding and expertise. As suggested by a number of KIs, a possible automatization of the annual production of the Review would save lot of resources and staff time, it would also enable UNECE/FAO FTS to produce and publish the Review earlier than the usual 4th quarter. As some KIs explained, they were ready to volunteer their time and resources to help with the production of Review if there were no funding available. While no other currently published periodical can provide the information and analysis contained in the Review, several KIs suggested that specialized topical issues affecting the forest market products could help to fill the gap should the Review no longer be available. It was also suggested that in-kind contributions by the industry associations and organizations needs to be more involved for the sake of sustainability of the Review.

In order for the Review to be sustainable it also needs to be available at the most convenient and useful time for member States. According to the online survey results, the majority of users prefer it to be published in 3rd or 4th quarter of each year, indicating that, usual publication period of September/October of each year was convenient time for most survey respondents.
The question on the extent to which the Review is considered as a reference source by stakeholders was asked to KIs as well as participants of the online survey. According to the individual interviews, being a single free source of specialized information on the forest products market, the Review is extremely valuable for research, analysis and as reference document. KIs agree that the governments or forest agencies in member States are regularly using the Review. While the governments utilize more detailed information on various forest commodities, the Review becomes useful for a quick research, quote or a presentation. As one KI from the Northern American region remarked, he has seen the Review being quoted on an annual basis in the government reports and reports of the chamber of commerce, “it gives you a good idea how other states are doing in the forestry market”. According to the opinion of KI from the EU region, the Review is primarily used by the government, adding that “the private sector left the audience, as the process became policy and regulation driven, some chapters are not of the same value as they used to be”. However, KIs also agree that freely available source of analytical information is extremely useful for smaller businesses who can’t afford to pay tens of thousands of USD in order to subscribe to the commercially available detailed databases and analysis. Some KIs also noted that the Review was widely used by international and non-governmental organizations involved with the forest products sector. The information contained in the Review is equally important for non-forest sectors such as construction, furniture, energy and others because of high relevance of wood products in these sectors.

The Review is especially useful for academia and students, who study and analyze long-term market trends. As one KI representing academia explained “I personally use it for analysis or a presentation, my students use Review during the seminars and quote it for their MA and PhD thesis”.

As shown on below figure 11, a majority of 40 out of 63 surveyed readers use the Review few times a year, 9 marked it for once a year, surprisingly 6 use them monthly and 3 more often, only 5 individuals out of 63 indicated that they never use the Review.
Figure 11 Online survey results - how often you refer to FPAMR

As demonstrated in figure 12 below, 52 of 63 surveyors use the Review for background information, 40 also use it for reference, while 26 use it for text, data, graphics and visualization.

Figure 12 - Online survey results - How do you use information from FPAMR (number of occurrences, multiple choices allowed)

Online survey participants also expressed their ideas on the information they would like to see in the Review. More information on climate change and forest products, non-wood forest products (like natural fibers), highly refined pulps, production and trade of charcoal, more reference to the Asian region, reuse of wood in the construction market, social issues, more on non-ECE countries including in the southern hemisphere and more interactive graphs were all listed in the comments.

The annually published Review and discussion around it evolved into continuous process that counts decades. As a UN publication, it offers a safe and attentive environment for governments, industry, international organizations and academia to share their views and exchange ideas. Interviewed KIs agreed that the discussions over the forest markets and products is an ongoing process and
commences with the publication of forest related data and statistics that is being analyzed and reported in the Review as well as other publications on national, regional and global levels.

As demonstrated in figure 11, over 80% of online survey participants use the Review several times a year, indicating that the Review is stimulating great interest and is part of the discussions, research or analysis on forest market products beyond the publication date. The evaluation documentation as well as interviews with selected KIs also suggest that format and translation of the Review is an important tool for wider engagement of users for non-English speaking Review readers.

According to the evaluation documents and attested by KI interviews, one way towards the sustainability of the Review is to turn it into an interactive web publication. In 2018, COFFI session participants suggested full digitalization of publications that would be available on the web as well as versions for smartphones and tablets. Members of ToS expressed their appreciation for an electronic version that was piloted in 2019. As the FRAMR was predominantly used for referencing, the ToS also suggested to keep the printed version. In 2020, the webflow version of the Review was introduced, it was optimized for online reading as well as for reading on a smart phone or tablet. The Review was produced as the standard interactive PDF and e-publication versions for an Android, Apple and Kindle e-reader. According to evaluation documentation, despite a promotional campaign, there were limited downloads for Android, Apple and Kindle versions when compared to the PDF version.

According to the evaluation documentation, the webflow document was used intensively (over 400 views in three months), however, data indicated that most views were generated from the desktop and computer based operating systems even though this version was meant to be used on mobile and tablet devices. Online survey participants also indicated their reading preferences, as previously demonstrated in figure 2, only three surveyors among 63 read the Review on a mobile device, the majority preferred to read its desktop version (87%) or paper edition (41%).

Below figure 10 demonstrates some of the preferences for improvement as selected in a multiple-choice question by online survey participants. 38 out of 63 surveyors prefer to see better link to database and interactive graphics, 33 would like to see short expert assessments or comments on top of sections, 21 suggested making the text of the Review machine readable enabling automated translation into different languages. Less than 20% of surveyors also suggested highly automated descriptive text based on statistics, making the Review barrier free for visually impaired audience and suggested improvement of Review readability for mobile devices.
Conclusions

The main conclusions are based on the analysis of the information collected through document review, interviews with the KIs and the online survey results, they follow the evaluation criteria of relevance, coherence, efficiency and sustainability.

Relevance

The evaluation confirmed that the Review is relevant to the needs of member States, it provides expert overview on forest products market in the UNECE region. For some member States the Review is the only available source of data and analysis on the subject. Being well informed on the forest market developments on the regional or sub-regional level helps member States to make evidence-based decisions and policies on the forestry sector. The majority of the online survey participants also indicated that the Review was relevant to the needs of member States. As KIs explained, the Review is not utilized for government reporting on national SDGs. However, the publication and expert community involved in the creation of its content indirectly work towards the achievement of the SDGs. An online survey response also indicate that the Review works indirectly on SDGs, half of the respondents thought it only contributed partially to the achievement of the SDGs, while a quarter was unaware.

The Review effectively captures emerging trends and challenges in the forest products market sector, however with optimization of publication a special chapter featuring trends and innovations was discontinued. The Review is also adapted to capturing challenges, it discussed topic on the effects of disturbances on the forest products market as well as challenges caused by COVID-19. While gender, human rights and disability perspectives have not been integrated in the Review, the evaluation confirmed that gender sensitive approach has been sufficiently integrated, ensuring the female authorship of Review. Some KIs and online survey participants thought that gender, human rights and
disability perspectives had a limited relevance in the context of the publication on forest products market.

**Coherence**
The Review readers are well informed on the major developments, shifts and trends in forest-based commodities in the UNECE region. Originally, the Review had ten chapters, however, the style and length of the Review was optimized as the COVID-19 pandemic affected funding and contributions to the publication. More than half of the online survey respondents thought that these changes were somewhat useful and almost a quarter of them thought that the optimization and lower page count were still useful. Positive feedback on change of length and style of the Review since 2020 indicates that the Review can be adapted to the changes and global shifts, while delivering the quality product even when affected by extraordinary circumstances. Online survey results also showed that the Review contributed to creating synergies among national, regional and global levels. The process is important for creating partnerships that contribute to coherent forest policy.

**Efficiency**
The evaluation found that while UNECE regular budget provided the framework for the publication, only a fraction of funding as well as in-kind contributions from member states helped to contract experts outside the UNECE to obtain their market intelligence. There were sufficient resources available to publish the Review due to member States financial and in-kind contributions. The funding became a big problem during the COVID-19 pandemic, the UNECE/FAO FTS optimized the process and used in-kind expert help. The lack of resources also affected translation of the Review. The production of the Review requires substantial human resources at UNECE/FAO FTS, however, as one member of staff retired, the expertise was lost and could not be replaced with the newly hired staff member, and it became even harder to continue the publication to the full extent as before.

**Sustainability**
The Review is a product of the collaboration between the UNECE/FAO FTS and its member States and it depends on extrabudgetary funds and outside experts. Interviewed KIs suggested that the automatization of the Review production will save resources and staff time, it will also enable UNECE/FAO to publish the Review by earlier date. The Review is an extremely valuable reference publication for research and analysis and is often quoted by other articles, the member State governments and specialized agencies use it for that purpose. Public servants utilize the Review to highlight the importance and relevance of the forest sector for the national economy. Forestry experts depend on it to showcase the value of the industry. Being a free resource, the Review is very useful for small businesses and academia, it is also widely used by international and non-governmental organizations in the forest products sector. The Review is equally important for non-forest sectors such as construction, furniture, energy and others. The online survey results show that the Review is primarily used for the background information, referencing, data, graphics and visualization and stimulates an interest of stakeholders beyond the publication date. KIs as well as online survey participants suggested upscaling of the Review to an interactive web publication with an automatization of the text allowing flexibility in terms of translating the contents into multiple languages, also improving accessibility for persons with disabilities. Automatization will also leave more time for secretariat to conduct and incorporate ad hoc studies on forest products that are in high
demand. Surveyed experts would also like to see better link to its databases, interactive graphics and have short expert assessments or comments on top of sections.

Lessons learned

The Review produced a number of lessons learned during the period of 2018-2021. According to the project documentation, one of the most significant lessons was the way UNECE/FAO dealt with the COVID-19 pandemic related challenges, optimizing the Review to continue serving the interests of its member States. The Review became more reader friendly and featured new chapters and information that was acknowledged as very useful. Streamlining the structure of the Review left the secretariat more time to focus on ad hoc issues and pressuring topics. Another learned lesson was related to the electronic production of the Review. As already discussed, the Review version for mobile phones and tablets didn’t attract enough users, and the online survey results also demonstrate that stakeholders prefer to read it over the desktop version, given that -as one KI pointed out- it was easier and more comfortable to read forest products market related graphs and data over the desktop.

Recommendations

The recommendations are based on the analysis of evaluation findings and conclusions, as well as suggestions made by KIs and online survey participants related to the Review and its process.

1. The evaluation recommends the Forest Products Annual Market Review to include information, data and statistics on Sustainable Development Goals relevant to the various forest products market sectors.
2. The evaluation recommends the subprogramme to consider – to the extent possible and without creating additional workload – redirecting existing regular budget resources for layout and printing to be primarily used to produce an electronic publication. A machine-readable electronic publication makes the content accessible to visually impaired users and users not able to read one of the three official languages of the UNECE via machine translation.
3. The evaluation recommends the subprogramme to investigate how – within the resources available – technological solutions could help further streamline the workflow to adjust to the human resources available in the subprogramme. These solutions could include – but may not be limited to – (partially) automated text generation from information from the database, and shorter expert assessments by each market segment.
4. The evaluation recommends the subprogramme to urge member States to consider a long-term planning for sustainable funding of the independent market expert input to the Review through a multi-donor, multi-year project.
5. The evaluation recommends the subprogramme to raise to the extent possible, awareness among member State representatives and readers of the Review on gender and human rights issues related to the forest market sector. This could be done by including a relevant question on gender and human rights in the Country Market Statements, the results could be summarized in the economic overview and policies chapter of the Review.
Annex 1

TERMS OF REFERENCE

Self-evaluation on the relevance of the Forest Products Annual Market Review to the needs of member States and challenges in the forest sector

I. Purpose

The purpose of this evaluation is to review the relevance, coherence, efficiency and sustainability of the Forest Products Annual Market Review (FPAMR) conducted by UNECE to the needs of member States in capturing and conceptualizing shifting trends affecting sustainable forest management and forest products markets for informing policy decisions in the UNECE region as mandated by the Committee on Forests and the Forest Industry (COFFI).

The results of the evaluation are expected to further upscale the FPAMR in terms of visibility, further analysis and partnerships with the view to better inform discussions under COFFI and the policies in the area of sustainable forest management and forest products markets in the UNECE region.

The outcomes of the evaluation will also be used to further strengthen the sections methods and processes of intergovernmental cooperation and collaboration between UNECE and FAO in supporting the subprogramme’s Integrated Programme of Work related to sustainable production and consumption of wood products.

II. Scope of activities for evaluation

The evaluation will look into the activities associated with the Forest Products Annual Market Reviews over the period from 2018 to 2021. The period was chosen since the secretariat significantly changed the style, content, approach and length of the publication in 2020 and feedback on the changes made would be useful. COVID-19 brought with it a lot of constraints for the production of the publication in 2020 and 2021. The evaluation will cover:

- Coordination of the research work
- Implementation by the secretariat
- Liaison and collaboration with partner organization at national and international levels
- Reporting to the UNECE COFFI and the FAO European Forestry Commission
- Internal reporting

In addition, the universally recognized values and principles of human rights and gender equality need to be integrated into all stages of the evaluation, in compliance with the United Nations Evaluation Group’s revised gender-related norms and standards. Therefore, the evaluation will assess how gender considerations, women empowerment and the perspectives of vulnerable groups were included in the process of conducting the Forest Products Annual Market Reviews and, if needed, it will make recommendations on how gender and vulnerabilities considerations can be better included in future activities.

III. Background

The Forest Products Annual Market Review is the flagship publication of subprogramme 7. The objectives of the Forest Products Annual Market Reviews are to provide general and statistical information on the forest products markets in the UNECE region of Europe, North America and
Eastern Europe, Caucasus and Central Asia. The Reviews are written in mid-year in preparation for the annual Market Discussion during the COFFI, which takes place during the autumn. They contain general overviews of forest products markets in the region, highlights of key issues and policies, as well as descriptions of the current economic situation. The substantive first chapter outlines the major policy and economic situation in the world and in the UNECE region and is followed by standard market chapters that examine the market development and their drivers for roundwood, sawn softwood, sawn hardwood, wood-based panels, paper and pulp, certified forest products, forest sector carbon markets, value-added forest products and tropical timber. For each sector, production, consumption and trade are considered and relevant developments in the markets and policies are included. The Reviews do not cover all topics every year.

The Reviews are one of the main outputs of Subprogramme 7 “Forests and the Forest Industry”, which is the UNECE part of the Joint UNECE/FAO Forestry and Timber Section. Subprogramme 7 monitors and analyses developments in markets, notably topical and policy relevant aspects, and provides a forum for discussion between governments and stakeholders at the annual UNECE COFFI.

IV. Issues

The evaluation will answer the following questions:

**Relevance**
1. Is the work conducted in the framework of the Forest Products Annual Market Reviews relevant for advancing intergovernmental efforts towards evidence-based policies for sustainable production and consumption of forest products and sustainable forest management?
2. To what extent does the FPAMR contribute to the achievements of the SDGs?
3. To what extent is the FPAMR adapted to capture emerging trends and challenges in the area of sustainable production and consumption of forests products and sustainable forest management?
4. To what extent does the analysis conducted in the framework of the Forest Products Annual Market Reviews integrate gender, human rights and disability perspectives?

**Coherence**
1. To what extent is the publication ensuring coherent treatment of the issues surrounding sustainable forest management and forest products and their trade?
2. To what extent does the work conducted contribute to creating synergies between national, regional and global levels?
3. To what extent do the partnerships created within the FPAMR contribute to ensuring policy coherence and the achievement of the SDGs?

**Efficiency**
1. Were there sufficient resources available to achieve the intended outcomes, including in a timely manner?
2. Does the work strike a good balance between the use of RB and XB?
3. Have the available resources been used efficiently to deliver expected outputs?

**Sustainability**
1. To what extent are the outputs delivered within the context of FPAMR sustainable?
2. To what extent is the FPAMR considered as a reference source by stakeholders?
3. To what extent does the FPAMR and the discussion around it contribute to soliciting broad engagement from different stakeholders from governments, private sector and academia beyond the publication date?
V. Methodology

The evaluation will adopt a theory-driven, utilization-focused and gender and human rights responsive approach. The evaluator is required to use a mixed-method approach, including qualitative as well as quantitative data gathering and analysis as the basis for a triangulation exercise of all available data to draw conclusions and findings.

The evaluation will be conducted on the basis of:

1. A desk review of all relevant documents over the period including:
   - All relevant documents including materials developed in support of the activities (agendas, plans, participant lists, background documents, final reports and publications)
   - Reports of the Forest Products Annual Market Reviews; Reports on annual work programme implementation
   - Proposed programme budgets covering the evaluation period
   - Relevant UN and UNECE resolutions on the matter

2. A tailored questionnaire will be developed by the evaluator in consultation with UNECE to assess the views of stakeholders: experts, members of the Forest Products Annual Market Reviews process, staff from UNECE, other regional commissions and relevant counterparts in the United Nations System and other international organizations.

3. The questionnaire will be followed by interviews of selected stakeholders from ministries, private sector and academia (methodology to be determined by the evaluator in consultation with UNECE). These will be carried out via phone or other electronic means of communication. Results of the survey will be disaggregated by gender.

The report will summarize the findings, conclusions and recommendations of the evaluation. An executive summary (max. 2 pages) will sum up the methodology of the evaluation, key findings, conclusions and recommendations.

All material needed for the evaluation will be provided to the consultant. In addition to the documents mentioned above in 1), the Programme Manager will provide the list of persons to be interviewed by phone. UNECE will provide support and further explanation to the evaluator as needed.

The evaluation will be conducted in accordance with the UNECE Evaluation Policy. A gender-responsive methodology, methods and tools, and data techniques are selected. The evaluation findings, conclusions and recommendations reflect a gender analysis.

VI. Evaluation schedule

<table>
<thead>
<tr>
<th>Date</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>02 August 2022</td>
<td>Evaluator submits inception report including survey design</td>
</tr>
<tr>
<td>10 August 2022</td>
<td>Feedback on inception report from the Programme Manager and PMU</td>
</tr>
<tr>
<td>29 August 2022</td>
<td>Launch of data gathering and conduct of interviews, as needed</td>
</tr>
<tr>
<td>10 October 2022</td>
<td>Evaluator submits draft report to the Programme Manager and PMU</td>
</tr>
<tr>
<td>31 October 2022</td>
<td>Feedback on draft report from the Programme Manager and PMU</td>
</tr>
<tr>
<td>11 November 2022</td>
<td>Evaluator submits final report</td>
</tr>
</tbody>
</table>

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12 Final timetable to be agreed following engagement of the evaluator
VII. Resources

Mr. Florian Steierer, Economic Affairs Officer, will manage the evaluation with the support of other Forests and the forest industry subprogramme staff. The Programme Management Unit (PMU) will provide guidance to the Programme Manager and evaluator as needed on the evaluation design, methodology and quality assurance of the final draft report.

VIII. Intended use / Next steps

The evaluation will be consistent with the UNECE Evaluation Policy. The results of the evaluation will be used in the planning and implementation of future activities of the Forests and the forest industry subprogramme in support of the realization of the 2030 Agenda for Sustainable Development and Paris agreement.

A management response to the evaluation will be prepared by UNECE, and relevant recommendations implemented as scheduled in the management response. Progress on implementation of recommendations will be available on the UNECE public website.

IX. Criteria for evaluation

The evaluator should have:

- An advanced university degree or equivalent background in relevant disciplines, with specialized training in areas such as evaluation, project management and social statistics.
- Knowledge of and experience in working with marketing and/or market assessment / economics / forests policy and its monitoring.
- Relevant professional experience in design and management of evaluation processes with multiple stakeholders, survey design and implementation, project planning, monitoring and management, gender mainstreaming and human-rights due diligence.
- Demonstrated methodological knowledge of evaluations, including quantitative and qualitative data collection and analysis for end-of-cycle project evaluations.
- Fluency in written and spoken English.

Evaluators should declare any conflict of interest to UNECE before embarking on an evaluation project, and at any point where such conflict occurs.
Annex 2

List of evaluation documents:

- FPAMR Planning Sheets for 2018, 2019, 2020 and 2021
- Production of FPAMR and processing of JFSQ, as of 28/05/20
- FPAMR Authors instructions for 2018, 2019, 2021
- Internal correspondence related to the FPAMR production and coordination work
- Reports by the UNECE Committee on forests (ECE/TIM/2021/2, FO:EFC/2021/2, ECE/TIM/2020/2, ECE/TIM/2019/2-FO:EFC/2019/2, ECE/TIM/2018/2)
- Reports by Teams of Specialists
- Terms of References and list of the members of Teams of Specialists working on FPAMR
- Proposed Programme Budgets for 2023 (A/77/6 (Sect. 20), 2017 (A/72/6 (Sect. 20), 2020 (A/74/6 (Sect. 20), 2021 (A/75/6 (Sect. 20), 2022 (A/76/6 (Sect. 20), 2018/19 (A/72/6 (Sect. 20)*
- The Warsaw Integrated Programme of Work 2018-2021 (ECE/TIM/2017/2)
## Annex 3

List of interviews:

<table>
<thead>
<tr>
<th>Name, title, organization, country</th>
<th>Interview date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mr. Florian Steierer, Economic Affairs Officer, UNECE/FAO Forestry and Timber Section</td>
<td>8/24/2022</td>
</tr>
<tr>
<td>Mr. Eoin O'Driscoll, Forestry Statistics Specialist, Department of Agriculture, Food &amp; the Marine Agriculture House</td>
<td>9/15/2022</td>
</tr>
<tr>
<td>Dr. Christopher Gaston, Associate Professor Markets and Economics. University of British Columbia</td>
<td>9/21/2022</td>
</tr>
<tr>
<td>Mr. Jean-Christophe Claudon, Statistical Assistant, International Tropical Timber Organization (ITTO)</td>
<td>9/22/2022</td>
</tr>
<tr>
<td>Dr. Francisco Aguilar, Professor, Department of Forest Economics, Swedish University of Agricultural Sciences (SLU)</td>
<td>9/23/2022</td>
</tr>
<tr>
<td>Ms. Iana Arkhipova, Consultant, Forest Products, Food and Agriculture Organization of the United Nations</td>
<td>9/23/2022</td>
</tr>
<tr>
<td>Ms. Maria Sokolenko, Deputy Head of Analytical Unit, International Department of the Federal Forestry Agency (Russian Federation)</td>
<td>9/23/2022</td>
</tr>
</tbody>
</table>
Annex 4

The evaluation questions

UNECE/FAO staff

1. What issues will you highlight as biggest success of this publication?
2. What were the main challenges and lessons learned from the past 3 years?
3. How do you ensure that the FPAMR is adapted to capture emerging trends and challenges of the forest sector?
4. How did FPAMR ensure mainstreaming of gender equality, human rights and disability perspectives?
5. In your opinion, do partnerships that are created within the FPAMR contribute to ensuring policy coherence and the achievement of the SDGs?
6. Were the available resources sufficient for intended outcome? Does the work strike a good balance between the use of RB and XB?
7. How efficiently were the available resources used for delivering of the FPAMR?
8. Going forward, what is the capacity of UNECE to support further amend and improve the product?
9. In your opinion, does the FPAMR contribute to soliciting broad stakeholder engagement beyond the publication?
10. What are the lessons learned from the past three years? (Keeping in mind challenges related to the early period of the COVID-19 outbreak – 2020/2021)
11. What could be the main changes to the FPAMR in the coming years? What are the needs to further amend the appearance, cover, timeline etc.?

Key Informant Interviews (online face-to-face interviews)

1. In your opinion, what is the most important segment or core feature of the FPAMR?
2. Is the FPAMR relevant for your country/ region or sector of work?
3. How is the FPAMR being used and who uses it to your knowledge?
4. Does the FPAMR and its coordination process contribute to the achievement of the SGDs? your country’s other international obligations, agendas or agreements with regards to forestry? If so, which ones?
5. In your opinion, does the FPAMR capture emerging trends and challenges in the forestry sector?
6. To what extent does this process integrate gender, human rights and disability perspectives? – is it needed to integrate these aspects in the FPAMR?
7. Are you aware of publications/information that is released by other UN entities that contains similar information like the FPAMR? – if yes, which ones. Is there a content overlap? – if yes – how much and which parts?
8. Does the FPAMR contribute to creating synergies between national, regional and global levels?
9. In your opinion, is the FPAMR considered as a reference source by stakeholders?

10. In your opinion, does the FPAMR and the discussion around it contribute to broad engagement of national governments, private sector and academia?

11. Do you have any comment, recommendations or suggestions for the UNECE/FAO with regards to the FPAMR? (or What would be your recommendation to make the FPAMR fit for the next decade?)

12. Should the UNECE/FAO Forestry and Timber Section no longer have the resources to produce the Review in the future, what would you propose as alternative product(s) that could provide the key information you need?

Online survey

1. Which region do you mostly work in?
   Multiple choices (National – which member State? / Regional – North America (US &CAN) or EU/EFTA or Eastern Europe, Caucasus and Central Asia (EECCA) / Southeastern Europe / Worldwide/ Other (please specify)

2. In which of the following sectors do you work? Multiple choices (Government / International Organization / Non-Government Organization (NGO) / Academia/ Finance/ Forest products manufacturing industry / Other industry/ Energy / Other (please specify)

3. Kindly indicate your gender (Male/Female/ decline to answer)

4. Over the past three years, have you read the Forest Products Annual Market Review (hereafter called the Review)? (Entirely / In part / Not at all)

5. How did you read the FPAMR (desktop, mobile device, paper, other please specify)

6. Editions of the Review from 2020 and 2021 included the following chapters/sections; please indicate how useful you find each (if you didn’t read, please indicate so in the X column).
   A multiple choice of sections listing: Economic overview and policies, Wood raw materials, Sawnwood, Wood-based panels, Pulp and paper, Wood energy, Value-added wood products. Surveyors will have a choice to answer each section with: Didn’t read it/ Not useful/ Slightly useful/ Somewhat useful/ Very useful

7. How satisfied were you with the information provided for:
   Your region (very satisfied, somewhat satisfied, not satisfied – please specify why)
   Other regions (very satisfied, somewhat satisfied, not satisfied – please specify why)

8. How would you rate the overall usefulness of the Review? (Not useful/ Slightly useful/ Somewhat useful/ Very useful)

9. How would you rate the relevancy of the Review to the needs of your country, region or sector? (Not relevant/ Slightly relevant / Somewhat relevant / Very relevant)

10. Do you use some information contained in the Review in your professional work?
11. Please indicate how often you refer to the Review in the course of your work. Multiple choices (Never/ Once a year/ A few times per year/ Once a month/ Once a week)

12. In your opinion does the Review contribute to the achievements of the SDGs in your country, region or sector? (Does not contribute/ contributes in part/ contributes entirely).

13. To what extent does the Review contribute to creating synergies between national, regional and global levels? (Does not contribute/ contributes in part/ contributes entirely).

14. How well is gender, human rights and disability perspectives incorporated in the forestry sector? (Entirely integrated /Integrated in part / Not integrated at all / Not familiar)

15. In 2020 the style, content, approach and length of the publication was significantly changed, did you find these changes useful? (Not useful/ Slightly useful/ Somewhat useful/ Very useful)

16. When would be the best time in the year to publish the Review in the future? (it is currently published in September / October each year)

   1st quarter / 2nd quarter / 3rd quarter / 4th quarter / don’t know

17. In what way could the Review be improved? Please indicate the most important ones.

   Improve readability of the Review on mobile devices / Make the publication barrier free for visually impaired audience / Make the text of the FPAMR machine readable to allow for automated translation into languages other than English / Better link to database and interactive graphics / Other (please specify)

18. Are there any topics not covered by the Review that you would like to be covered? (No/ Yes (please specify)

19. We are interested in any other comments that you may have about the Review. [text box]

20. Should the UNECE/FAO Forestry and Timber Section no longer have the resources to produce the Review in the future, what would you propose as alternative product(s) that could provide the key information you need?